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Kentucky Office of the Health Benefit and Information Exchange

Medicaid Waiver Management Application (MWMA) Instructor-Led Training for Quality Improvement Organization Staff

Housekeeping

- Bathroom locations
- Smoking location
- Participant materials
  - Hard copies
  - MWMA Training Portal
- Food/Drinks policy for this computer lab
- Breaks
  - Step out of the room when necessary to avoid disrupting the class

Ground Rules

- Please stay “with the class”
  - Work only with your assigned Individual
  - Use the appropriate log in credentials
  - If you finish a task early, help your neighbor
- Respect others and their points of view
- Let facilitators know if you get behind or need clarification
- Silence cell phones, minimize texting, and refrain from checking social media accounts on computer lab equipment
- Do not disconnect any cables or equipment
- Complete online training evaluation

Course Agenda

Topic	Minutes	Time
Welcome – Introductions, Housekeeping and Ground Rules	15	9:00-9:15
Lesson 1: MWMA Overview	30	9:15 – 9:45
Lesson 2: System Navigation	15	9:45-10:00
Lesson 3: Level of Care Review and Determination	45	10:00-10:45
Break (15)		
Lesson 4: Plan of Care Review	45	11:00-11:45
LUNCH		
Miscellaneous Tasks	60	12:45-1:345
Lesson 5: Application Review	45	1:45-2:30
Questions and Wrap-up	60	2:30-3:30

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Medicaid Waiver Management Application (MWMA)

Lesson 1: MWMA Overview

Lesson Objectives

Upon completion of this lesson, you will be able to:

- Describe the features and benefits of the Medicaid Waiver Management Application (MWMA)
- Describe the enhancements provided by MWMA to current business practices

Lesson Time: *15 minutes*

What is the Medicaid Waiver Management Application?

- Collaborative effort between the Cabinet for Health and Family Services and the Kentucky Office of the Health Benefit and Health Information Exchange (KOHBHIE)
- Implementation of a web-enabled case management application to support the delivery of home and community-based services under the Medicaid waiver programs
- Two-phased implementation: April 2015 and December 2015

Why is the Commonwealth Implementing MWMA?

Current Waiver Process

- Uses a variety of different databases, paper files, emails and spreadsheets
- Processes are cumbersome, inefficient, and duplicative

New MWMA Application

- Standardizes and streamlines the waiver application process
- Improves care coordination and service delivery to waiver recipients and their families
- Self-service access will help individuals and families make more informed choices

Features of the Medicaid Waiver Management Application

MWMA will be built on the existing KHBE platform which houses kynect, Kentucky's healthcare connection. The application will:

- Standardize and automate essential waiver program processes;
- Provide an integrated, comprehensive view of the individual's services and supports;
- Enable a person-centered approach to service delivery; and
- Integrate with existing commonwealth systems, providing consistency across technology standards and enabling a Cabinet-wide view of information across Medicaid waiver programs.

What Benefits Does the Medicaid Waiver Management Application Provide?

- Provides automated capabilities around the intake, assessment, eligibility determination, plan of care, case management, incident management, timesheet and reporting functions performed by waiver service providers
- Provides individuals and families with self-service access to manage their waiver program applications, plan of care, services and timesheets
- Access to information in real-time
- Integrates with kynect, Kentucky's healthcare connection (as of 2nd MWMA release)

What Can You Expect from this MWMA Training?

Spring 2015

Expect to receive training on these topics:

Winter 2015

- Standardized waiver application intake
- Streamlined Level of Care assessment submission and review processes
- Streamlined Plan of Care development, submission and review processes
- Case Management Tools – Case Manager Assignment, Caseload Management, Case Transfers, Program Closures, Case Notes and more
- Automated workflows, tasks and notifications
- Electronic document submission and storage
- Prescreening tools
- Self Service capability for Individuals/Families
- Streamlined application intake across multiple programs (Waiver, SNAP, TANF, Medicaid, etc)
- Improved assessment tools
- Streamlined Medicaid Eligibility and Waiver Enrollment Processes
- Automated waiting list management
- Electronic timesheets for participant directed services
- Streamlined Incident Reporting and Review

MWMA Training Resources

The following resources provide additional information and instruction:

- **User Manual:** *User Guide: kynect Medicaid Waiver Management Application, Lesson 1*

- **Quick Reference Guides/Job Aids:**
  - *Application, Case, and Program Status Quick Reference Guide*
  - *Medicaid Waiver Management Application Onboarding Manual*
  - *Transitioning the Use of the MAP-24 and MAP-24C Quick Reference Guide*

- **Online Courses/Web-based Training (WBTs):** *Medicaid Waiver Management Application Overview* course (3 lessons)

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Medicaid Waiver Management Application (MWMA)

Lesson 1: MWMA Onboarding

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Medicaid Waiver Management Application (MWMA)

Lesson 2: System Navigation

Lesson Objectives

Upon completion of this lesson, you will be able to:

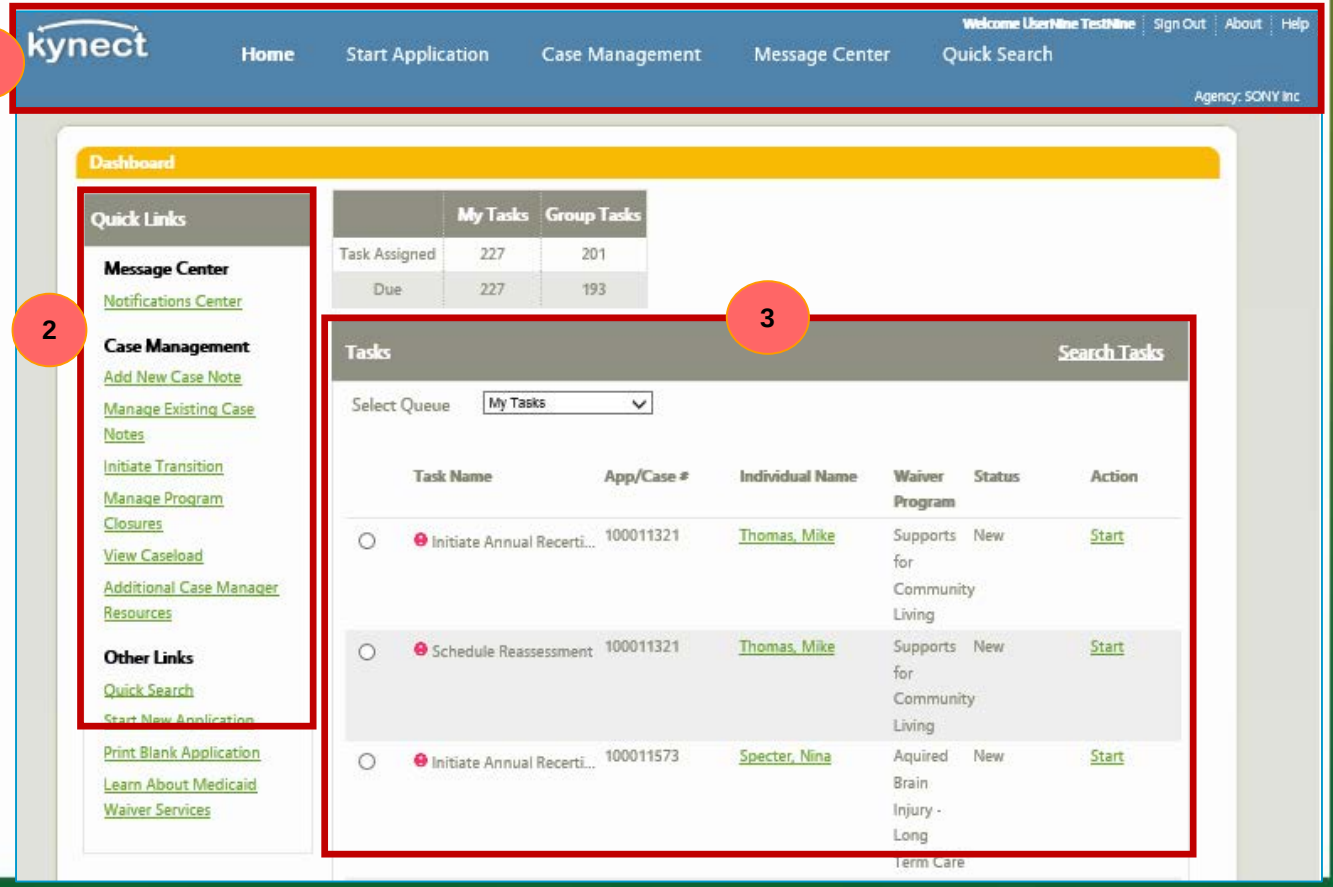
- Describe basic navigation in MWMA
- Describe features of the Dashboard screen

Lesson Time: *30 minutes*

System Navigation Overview

Users are able to easily navigate MWMA through key links located on the:

1. Top Navigation Bar
2. Left Navigation Bar
3. Center Dashboard



Exploring the Top Navigation Bar

The user can navigate to different areas of MWMA by using the links that display on the top navigation bar located at the top of each screen.

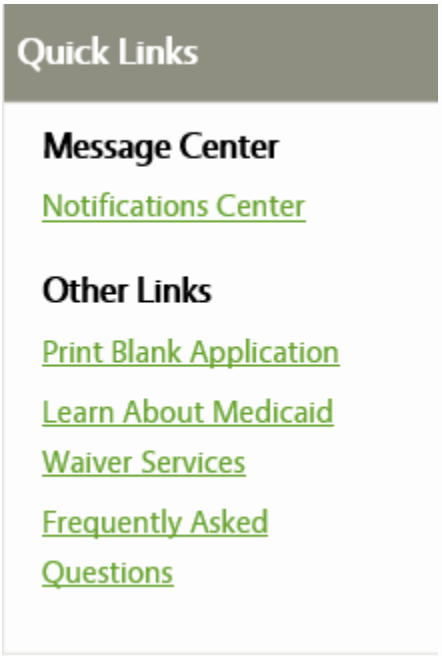
QIO Top Navigation Bar

Exploring the Left Navigation Bar

The left menu navigation bar consists of Quick Links which are links to the most common tasks/actions that pertain to the logged-in user.

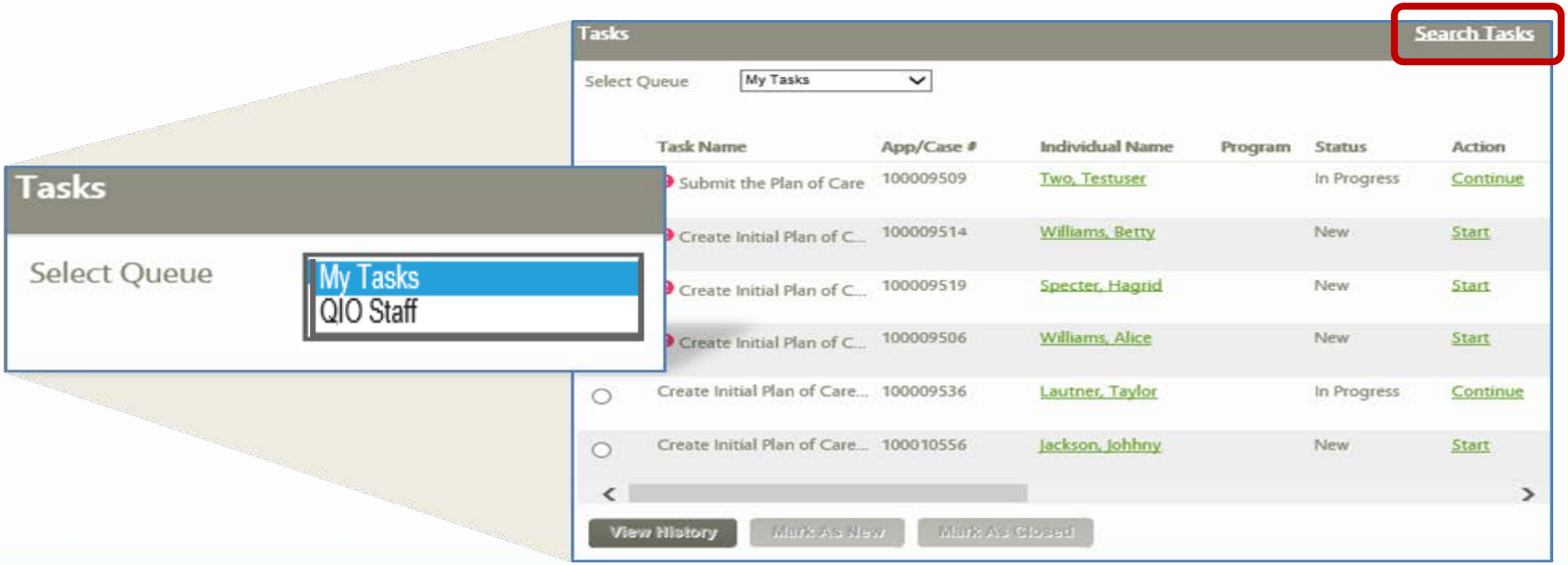
There are two main categories of Quick Links:

1. Message Center
2. Other Links



Exploring the Center Dashboard

The **Select Queue** drop-down menu is located on the top left of the Tasks section. The Tasks section is always populated with tasks that are only assigned to the logged-in user. The **Select Queue** drop-down menu allows the user to search for tasks that are assigned to their user group.



Search Tasks

Search By Individual

Individual ID

Lookup

Search By Task

Agency: Whitewater Inc

Assigned To

Task Status: --Select--

County: --Select--

Program: --Select--

Task Name: --Select--

Due Date From :

To :

--Select--
<Case Note Type> case note missing for <Note Period>
Create and Submit Plan of Care for newly assigned individual
Initiate Annual Recertification
Lack of Information
Modify Plan of Care
Perform Assessment
Program Closure - View Program Closure
Record Assessment Results
Revisions Requested by Case Management Admin
Revisions Requested by Case Supervisor
Revisions Requested by Plan Reviewer
Schedule Reassessment
Submit Annual Recertification
Update Objective Status
Update Service Actual Start Date

Back | Reset | Search

Instructor Demo of MWMA – Basic System Navigation

To follow along the instructor demo of MWMA System Navigation:

1. Use the log in credentials provided by the instructors to log in to the desktop computer

2. Launch web browser
   - Internet Explorer (IE)
   - Firefox
   - Chrome

3. Enter URL for MWMA Training Environment:

   https://uat4.kywaiver.ky.gov

4. Log in using the QIO log in credentials on your **ILT Exercise Data Sheet**

MWMA Training Resources

The following resources provide additional information and instruction:

- **User Manual:** *User Guide: kynect Medicaid Waiver Management Application, Lesson 2*

- **Quick Reference Guides/Job Aids:**
  - *System Navigation Quick Reference Guide*
  - *Performing Searches Quick Reference Guide*

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Medicaid Waiver Management Application (MWMA)

Lesson 3: Level of Care Review and Determination

MWMA Lifecycle

Application Initiator
Submits application.

Application Reviewer
(QIO)
Reviews submitted application.

Capacity Reviewer
(CHFS)
Determines if targeting criteria is met, determines urgency of need, and capacity in a waiver.

LOC Assessor
(Assessment Agency)
Completes LOC Assessment.

LOC Reviewer
(QIO)
Reviews LOC Assessment and makes determination.

Case Supervisor
(Case Management Agency)
Case Supervisor assigns Individual to a Case Manager.

Case Manager
(Case Management Agency)
Begins to perform case management activities.

DCBS Caseworker
(DCBS)
Enrolls Individual in designated waiver program through KAMES.

Case Manager
(Case Management Agency)
Submits Plan of Care.

Plan Reviewer
(QIO)
Approves prior authorization and submits the POC as “Current”.

Lesson Objectives

Upon completion of this lesson, you will be able to:

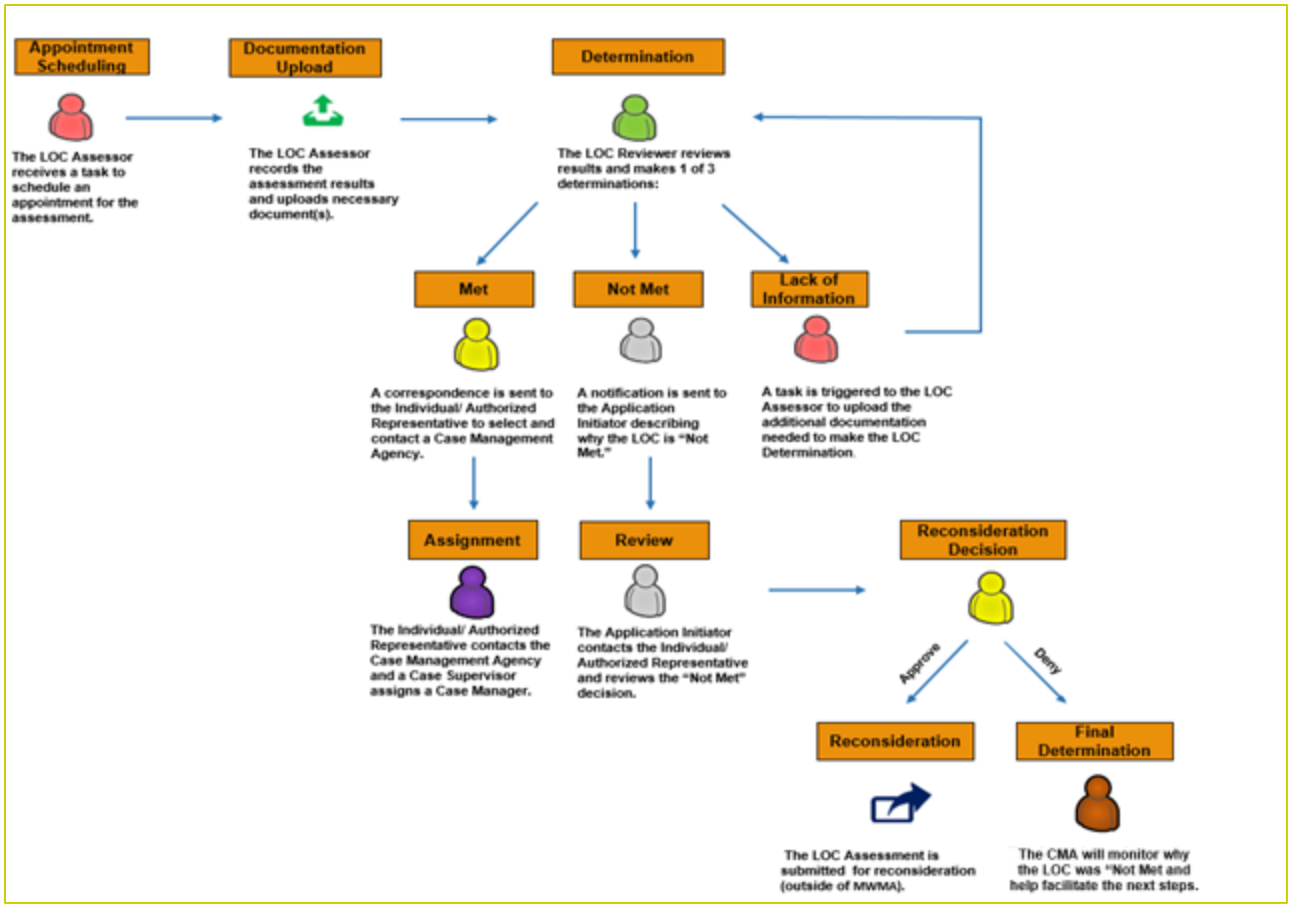
- Perform a Level of Care (LOC) assessment review
- Record the status of uploaded documents
- Record a LOC Determination of Met, LOI and change a Not Met status to Met.

Lesson Time: 45 minutes

Medicaid Waiver Application LOC Determination Overview

Within MWMA the LOC Review and Determination screens are used to review information collected by the LOC Assessor and record if an Individual's LOC has been Met, Not Met or if there is a LOI.

Medicaid Waiver LOC Assessment Process


Appointment Scheduling
Documentation Upload
Determination
The LOC Assessor receives a task to schedule an appointment for the assessment.
The LOC Assessor records the assessment results and uploads necessary document(s).
The LOC Reviewer reviews results and makes 1 of 3 determinations:
Met
Not Met
Lack of Information
A correspondence is sent to the Individual/ Authorized Representative to select and contact a Case Management Agency.
A notification is sent to the Application Initiator describing why the LOC is "Not Met."
A task is triggered to the LOC Assessor to upload the additional documentation needed to make the LOC Determination.
Assignment
Review
Reconsideration Decision
The Individual/ Authorized Representative contacts the Case Management Agency and a Case Supervisor assigns a Case Manager.
The Application Initiator contacts the Individual/ Authorized Representative and reviews the "Not Met" decision.
Approve
Deny
Reconsideration
Final Determination
The LOC Assessment is submitted for reconsideration (outside of MWMA).
The CMA will monitor why the LOC was "Not Met and help facilitate the next steps.

Roles in the Medicaid Waiver LOC Assessment Process

Level of Care Assessor

Enters assessment results and uploads documentation after meeting with the Individual

Level of Care Reviewer

Reviews assessment results, uploaded documentation and records a determination

Application Initiator

Reviews information when the LOC is deemed "Not Met" and contacts the Individual to review the decision

Case Management Administrator

Monitors why the LOC was "Not Met" and helps facilitate the next steps.

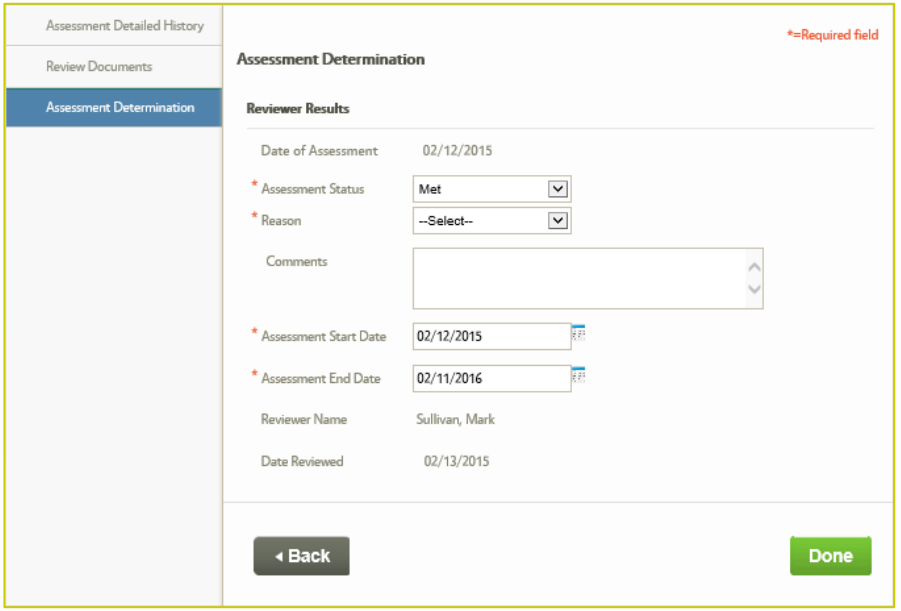
How does the MWMA enhance and streamline the LOC Review and Determination process?

- MWMA enhances and streamlines current manual and paper- based processes by creating tasks for various roles involved in the assessment process, including:
  - A task for the LOC Reviewer to make a LOC determination
  - A task for the LOC Assessor when there is a LOI
  - A task for the Application Initiator or Case Manager when the LOC is Not Met.
  - A task for the Case Manager to have the Individual apply for Medicaid when the LOC is Met.
  - A task for the Case Management Administrator 13 days after the Not Met decision is made to monitor the appeal process.
- Allows comments to be inserted by the LOC Reviewer when the LOC is met, not met or pended.

MWMA LOC Review and Determination Screens

MWMA includes the following three LOC Review and Determination screens used by the LOC Reviewer:

- **Level of Care Assessment Results Summary**
- **Documents Upload**
- **Assessment Determination**



Instructor Demo of MWMA–
LOC Determination Process for Met, LOI, Not Met to Met

Demo Time: *20 minutes*

Check Your Understanding

True or False:

You can change a determination via the program summary screen.

MWMA Training Resources

The following resources provide additional information and instruction:

- **User Manual:** *User Guide: kynect Medicaid Waiver Management Application, Lesson 6*

- **Quick Reference Guides/Job Aids:**
  - *Assessment Determination Quick Reference Guide*

- **Online Courses/Web-based Training (WBTs):**
  - *Performing an Assessment for Medicaid Waiver Services* course (7 lessons)
  - *Performing a Reassessment for Medicaid Waiver Services* course (5 lessons)

Break

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Medicaid Waiver Management Application (MWMA)

Lesson 4: Plan of Care

Lesson Objectives

Upon completion of this lesson, you will be able to:

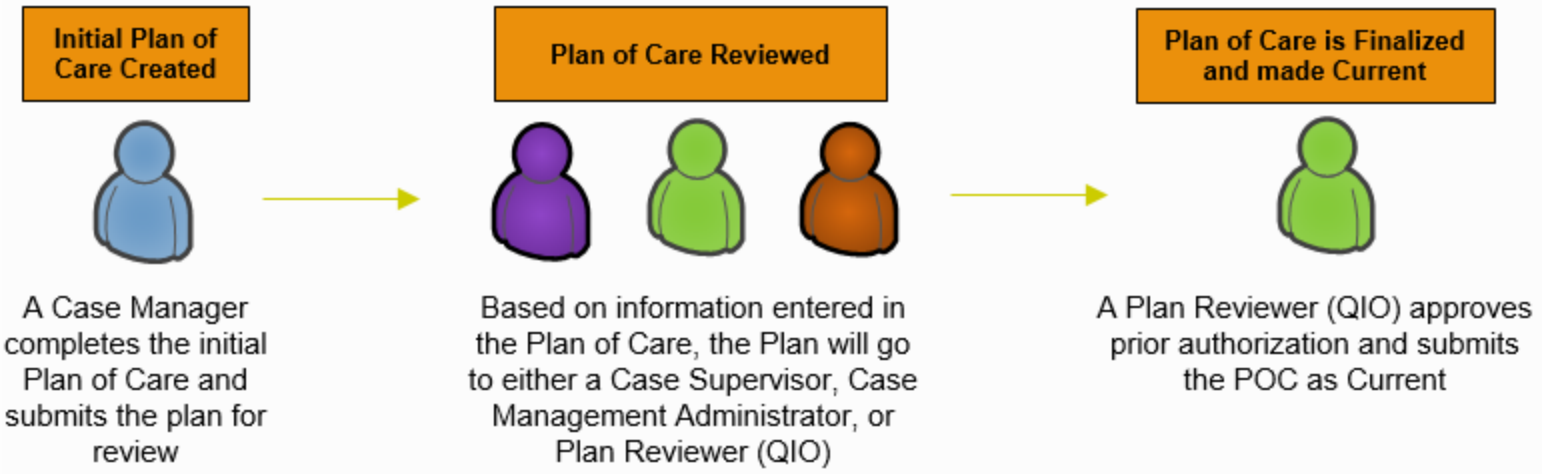
- Describe how MWMA supports the Plan of Care lifecycle
- Identify the MWMA user roles involved in the Plan of Care lifecycle
- Review a Plan of Care in MWMA

Lesson Time: *45 minutes*

Plan of Care Review Overview

Within MWMA ,the Plan of Care (POC) Review function is used to review a created and submitted Plan of Care for an Individual. MWMA provides QIO with the tools to review POCs and review added services to make prior authorization decisions.

Plan of Care Lifecycle


Initial Plan of Care Created
Plan of Care Reviewed
Plan of Care is Finalized and made Current
A Case Manager completes the initial Plan of Care and submits the plan for review
Based on information entered in the Plan of Care, the Plan will go to either a Case Supervisor, Case Management Administrator, or Plan Reviewer (QIO)
A Plan Reviewer (QIO) approves prior authorization and submits the POC as Current

Roles in the Plan of Care Lifecycle

Case Manager

Initiates the POC for an Individual and submits the POC to be reviewed.

Case Supervisor

Reviews the POC and makes comments on data entered by the Case Manager.

Case Management Administrator

Reviews the POC when there is a provider conflict or an exceptional rate/unit request.

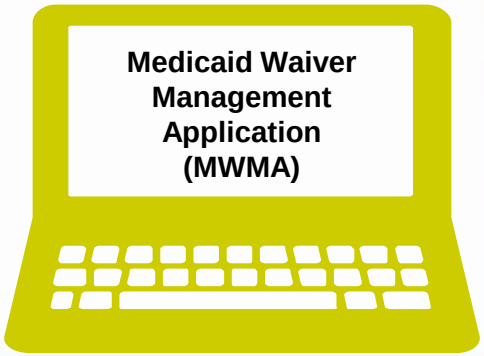
Plan Reviewer

Reviews the POC and submits a prior authorization decision.

How does the MWMA enhance and streamline the Plan of Care processes?

MWMA enhances and streamlines current manual and paper-based case management activities through the following functionalities:

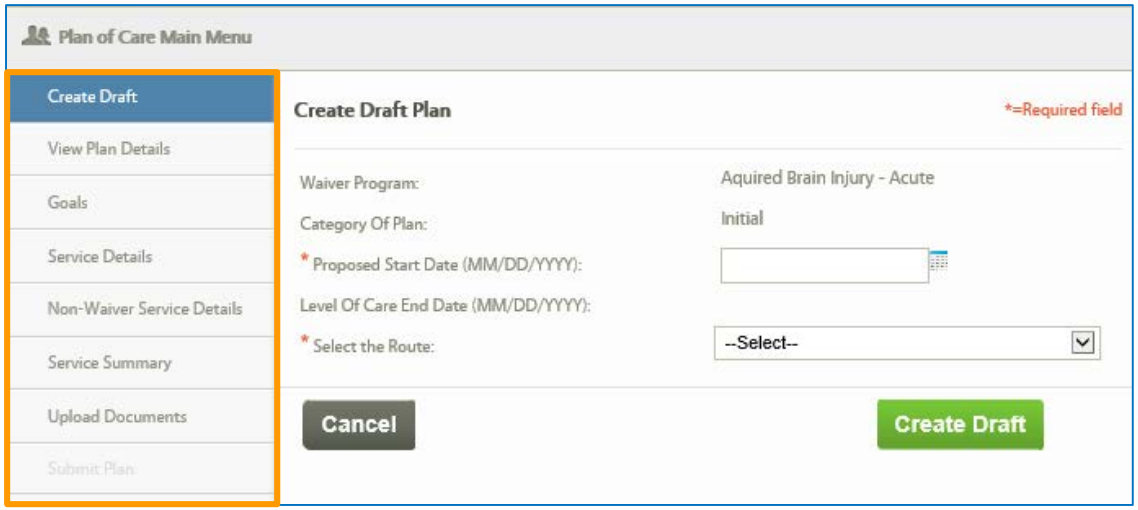
- Generated tasks for each role when an action must be taken
- Ability to enter comments on a POC that are visible to all applicable roles in MWMA
- Ability to upload documents and attach them to the plan



MWMA POC Screens

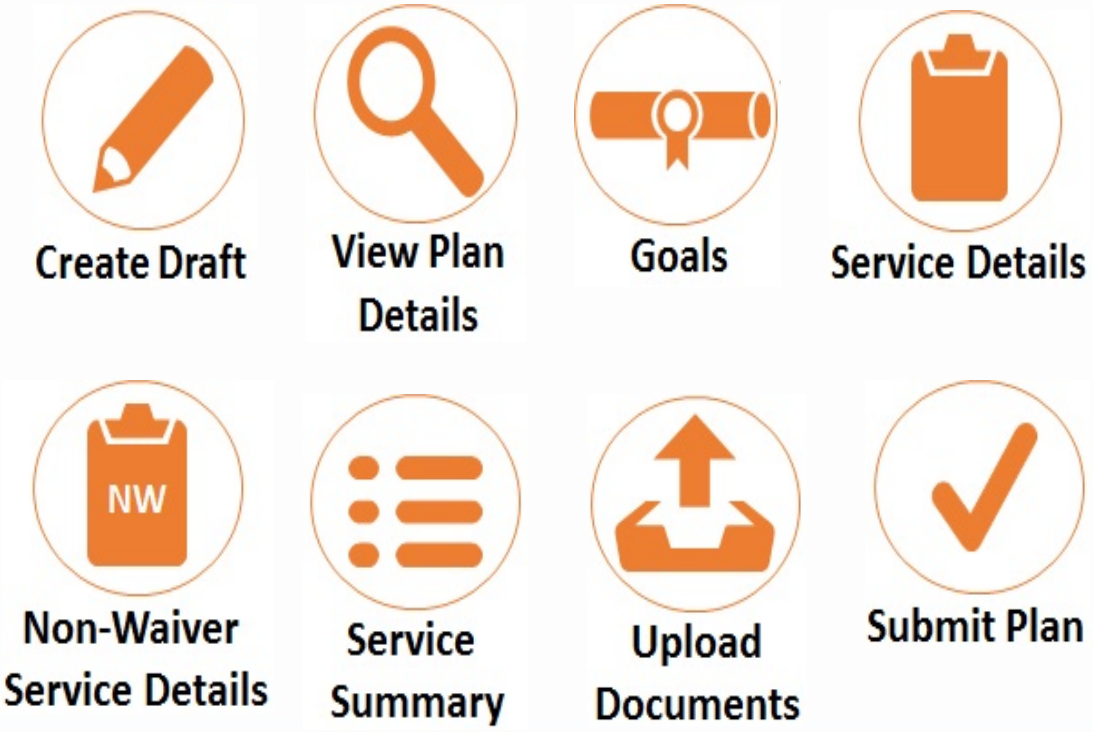
The **Plan of Care Main Menu** screen is includes the following eight sections that constitute an Individual's Plan of Care:

- **Create Draft**
- **View Plan Details**
- **Goals**
- **Service Details**
- **Non-Waiver Service Details**
- **Service Summary**
- **Upload Documents**
- **Submit Plan**



Overview of each section in Plan of Care

A general understanding of the following sections will be useful before we practice initiating and submitting a POC.



Prior Authorizations in Plan of Care

After the Plan Reviewer has selected an Individual's POC to review and has reached the ***Service Details*** screen, you are required to approve, not approve, or pend the services in the Individual's POC.

Prior Authorization Decision	Plan of Care Route
Approved	The Case Manager receives a system-generated notification that all services have been approved and the POC status is updated to current.
Not Approved or Pended	If a service is Pended with a reason of LOI or CDO Budget, the plan status will become "Revisions Requested by QIO", and the plan will be sent back to the Case Manager with a Revisions Requested by Plan Reviewer task.
	If all services are Not Approved or Pended with a reason other than LOI or CDO Budget, then the plan status is Current. A Revisions Requested by Plan Reviewer task will also be generated for the Case Manager to be able to upload documents.

Classroom Exercise–
Prior Authorization Decisions

Demo Time: *20 minutes*

Check Your Understanding

True or False:

If “Not Approved” or “Pended” is selected, the “Reason” field displays and requires a response.

Plan of Care Recap

You should now be able to:

- Describe how MWMA supports the Plan of Care lifecycle
- Identify the MWMA user roles involved in the Plan of Care lifecycle
- Review a Plan of Care in MWMA

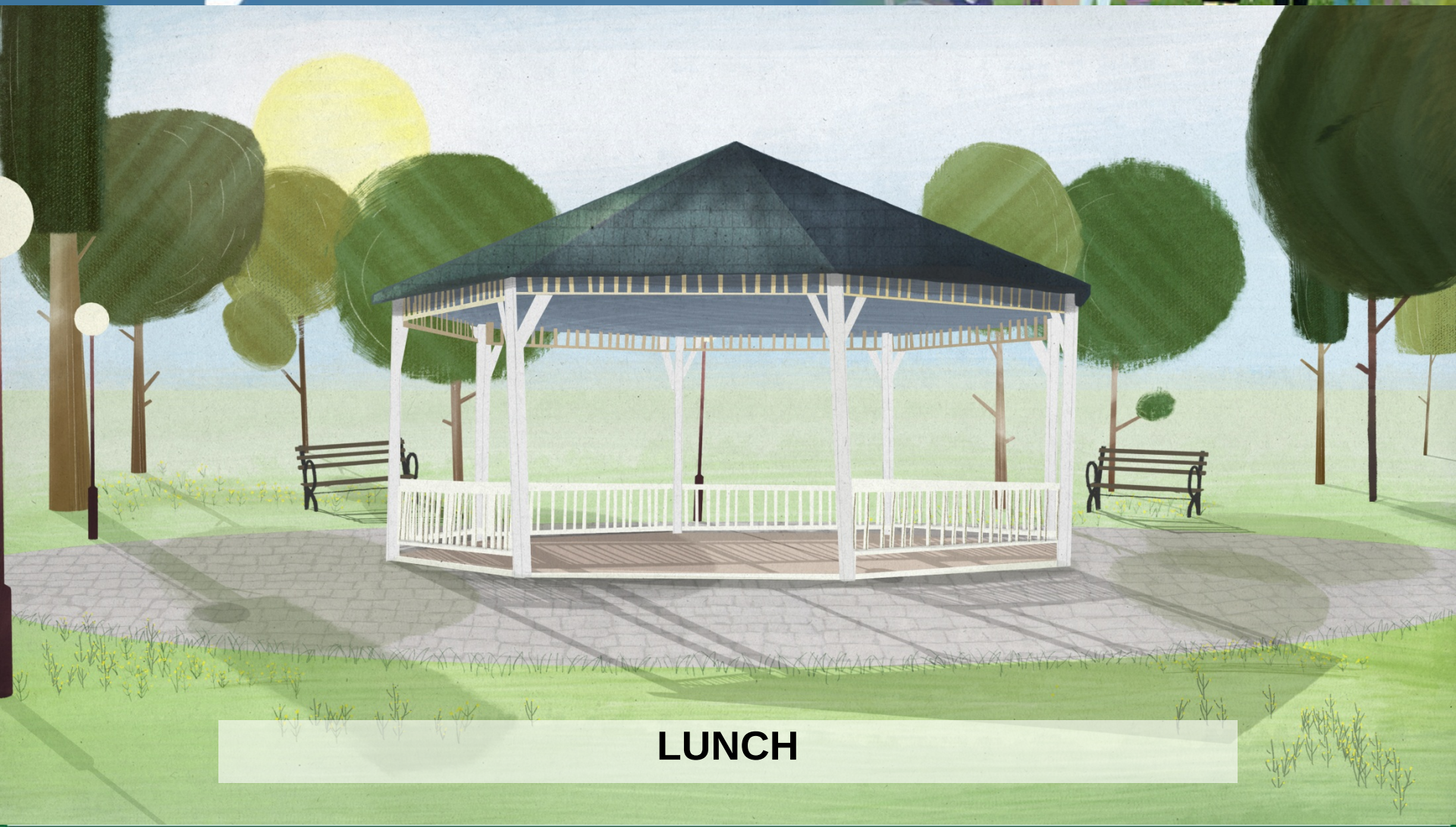
MWMA Training Resources

The following resources provide additional information and instruction:

- **User Manual:** *User Guide: kynect Medicaid Waiver Management Application, Lesson 10*

- **Quick Reference Guides/Job Aids:**
  - *Plan of Care Status Quick Reference Guide*
  - *Service Units and Rate Quick Reference Guide*
  - *Determining Prior Authorization of Services Quick Reference Guide*
  - *Understanding the ADD Functionality in MWMA Quick Reference Guide*
  - *Using the ADD Module for ABI Waivers POC Submission Quick Reference Guide*
  - *Using the ADD Module for Supports for Community Living POC Submission Quick Reference Guide*

- **Online Courses/Web-based Training (WBTs):** *Managing a Plan of Care* course (10 lessons)



LUNCH

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Medicaid Waiver Management Application (MWMA)

Lesson 5: Miscellaneous Tasks

Lesson Objectives

Upon completion of this lesson, you will be able to:

- Review the Record for Inability to Access Services Submitted and Update MAXMC tasks
- Review the Program Closure-Update MAXMC task
- Finalize capacity for the Michelle P Waiver

Lesson Time: 45 minutes

Recording Inability to Access Services Overview

The record for inability to access services task serves as a reminder to update the MAXMC system with the information provided from the Case Supervisor.

Roles involved in the Inability to Access Services Process

Case Supervisor

Talks to the Individual and submits the inability to access services.

QIO (Care Wise)

Reviews the inability to access services information and updates the MAXMC system.

Class Exercise-

Reviewing the Record Inability to Access Services Tasks

Program Closure Overview

The Program Closure- Update MAXMC task serves as a reminder to update the MAXMC system with the information provided from the Case Supervisor.

Roles involved in the Program Closure Process

Case Supervisor

Submits the program closure request.

QIO (Care Wise)

Reviews the program closure information and updates the MAXMC system.

Class Exercise-

Reviewing the Program Closure- Update MAXMC task

Finalizing Capacity for Michelle P Waiver Overview

Once the Individual is enrolled in Michelle P, a task will be triggered to finalize capacity for the Individual. Once the task is selected, you will have the ability to confirm a spot in the waiver for the Individual.

Class Exercise-

Finalizing Capacity for the Michelle P Waiver

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Kentucky Office of the Health Benefit and Information Exchange

Medicaid Waiver Management Application (MWMA)

Lesson 6: MWMA Application Review

Lesson Objectives

Upon completion of this lesson, you will be able to:

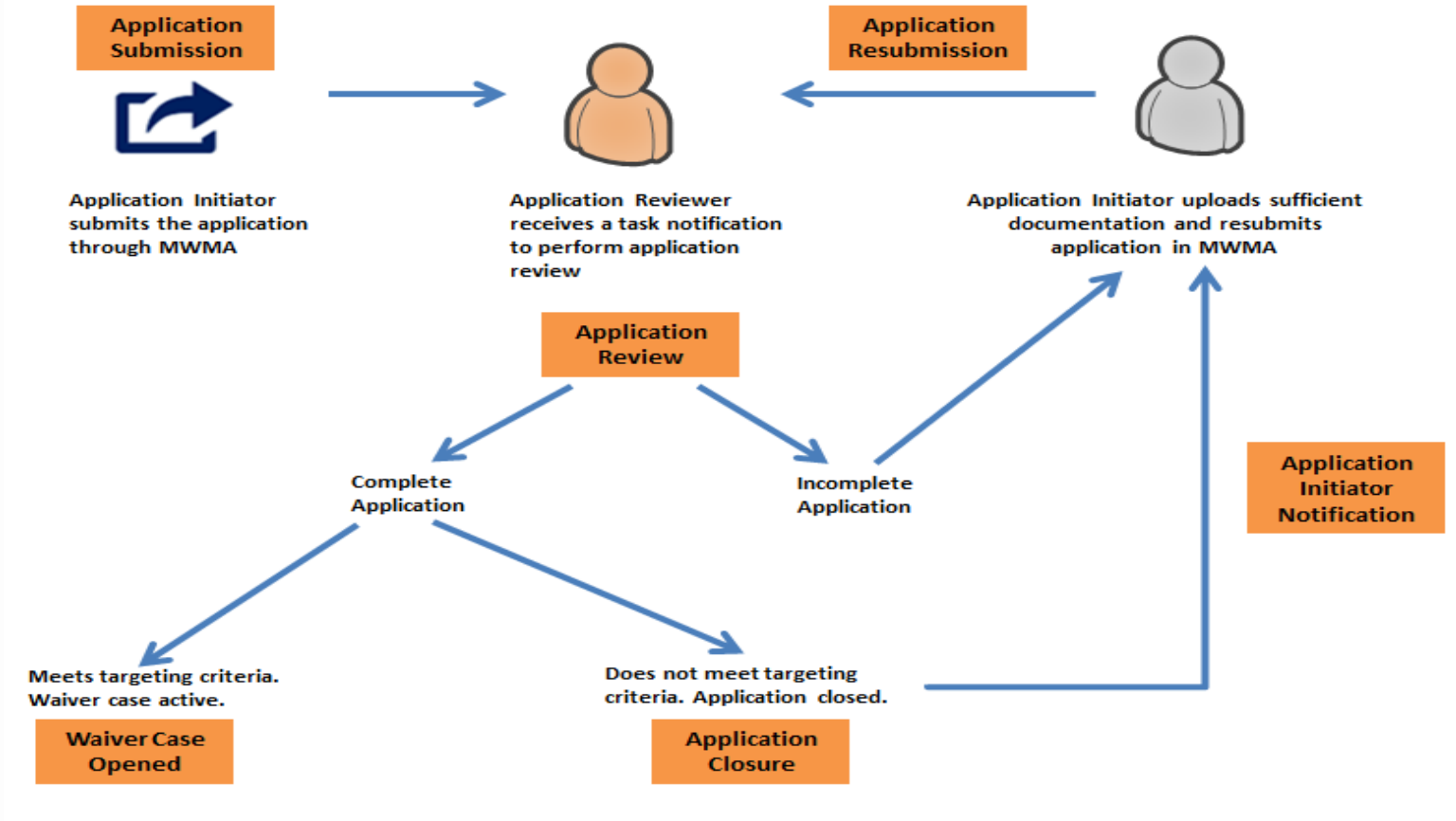
- Describe the waiver application review process
- Perform an application review
- Determine status of an uploaded document
- Use Member Match to identify an Individual within MWMA

Lesson Time: *45 minutes*

Medicaid Waiver Application Review Overview

Application Review serves as the second half of the waiver application process. The Application Reviewer reviews the application details and submitted documents. After completing their review, the Application Reviewer will refer the application to the waiver program that best suits the Individual's needs according to the waiver program's designated targeting criteria.

Medicaid Waiver Application Review Process


Application Submission
Application Resubmission
Application Initiator submits the application through MWMA
Application Reviewer receives a task notification to perform application review
Application Initiator uploads sufficient documentation and resubmits application in MWMA
Application Review
Complete Application
Incomplete Application
Application Initiator Notification
Meets targeting criteria. Waiver case active.
Does not meet targeting criteria. Application closed.
Waiver Case Opened
Application Closure

Roles Involved in the Medicaid Waiver Application Review Process

Application Initiator

Enters documentation and information on behalf of the Individual

Application Reviewer

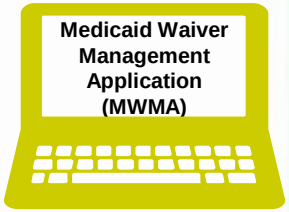
Reviews the application and uses targeting criteria to refer the application to a waiver program

Capacity Reviewer

Reviews the application and comments entered by the Application Reviewer

How does the MWMA enhance and streamline the application review process?

- Creates tasks for various roles involved in the review process
- Allows entry of comments during the review process. Comments are viewable by other Application Reviewers as well as the Capacity Reviewer
- Allows the review of supporting documents to occur concurrently with the review of the waiver application
- Keeps an electronic record of the Application Reviewer's determination whether the documents are sufficient to substantiate the waiver application or not



Classroom Exercise

Reviewing, Entering Comments, and Referring a Waiver Application in MWMA

Demo Time: *20 minutes*

Check Your Understanding

True or False:

An application with an uploaded document that has been marked as “Invalid” may still be referred to a waiver program.

Member Match Overview

If the Medicaid Waiver Case Management Application cannot determine with 100% certainty that an Individual already exists within the KHBE system, the Application Reviewer must make this determination using the ***Member Match*** screen.

Application Review Task Name	Description
Application Review	A submitted waiver application that is ready for review by the Application Reviewer
Application Review and Partial Match	A submitted waiver application that has potential matches. The Application Reviewer needs to resolve the partial match prior to reviewing the application.
Application Review –Another Waiver	A waiver application that has been resubmitted by the Application Initiator and needs to be reviewed by the Application Reviewer before the Application Reviewer refers it to a different waiver program.

Member Match Continued

Member Match *=Required field

*Potential Matches for this individual has been found. Please select the individual with the correct information to continue.

*	Name	Date Of Birth	SSN	Physical Address	Phone#	Gender
○	TUCKIE KEN	12/04/1956		123 MAIN STREET 022 KY 40503	(502) 555-1212	M

Representative Contact Information

Authorized Representative Name	N/A	Authorized Representative Phone	N/A
Application Initiator Name	AppOne TestAppIniOne	Application Initiator Phone	N/A

Potential Matches for this Individual that already exist in KHBE

	Name	Date Of Birth	SSN	Physical Address	Phone#	Phone#	Match Score
○	TUCKIE KEN	12/04/1956	561327723			M	127 (Partial Match)
○	TUCKIE KEN	12/04/1956				M	127 (Partial Match)

◂ Back Next ▸

Classroom Exercise
LOI and Member Match

Demo Time: *20 minutes*

Waiver Application Review Recap

You should now be able to:

- Describe the waiver application review process
- Perform an application review
- Determine status of an uploaded document
- Use Member Match to identify an Individual within MWMA

MWMA Training Resources

The following resources provide additional information and instruction:

- **User Manual:** *User Guide: kynect Medicaid Waiver Management Application, Lesson 4*

- **Quick Reference Guides/Job Aids:**
  - *Using Member Match and Individual Summary Screens Quick Reference Guide*
  - *Using Targeting Criteria Quick Reference Guide*

- **Online Courses/Web-based Training (WBTs):** *Reviewing an Application for Medicaid Waiver Services* course (6 lessons)

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Kentucky Office of the Health Benefit and Information Exchange

Medicaid Waiver Management Application (MWMA) Instructor-Led Training

Course Wrap Up

MWMA information on CHFS website

http://chfs.ky.gov/dms/mwma.htm

MWMA Training Portal

Hosted by Eastern Kentucky University's (EKU) learning management system, TRIS

http://tris.eku.edu/mwma/accountinfo.aspx#

Congratulations!

You have completed the Medicaid Waiver Management Application Instructor-led Training Course!

Questions

Are there any unanswered questions or concerns regarding today's training?